

On Becoming an e-Agent—Managing Contacts Part IX

By Jo Becker, GRI, BA

If your idea of contact management is a rolodex, names and numbers scribbled on napkins and scraps of paper and it's been ages since you sent a letter, postcard, or holiday greeting to your sphere than it's time to upgrade your system with the power of today's technology.

Most of us have any number of programs already on our computer that will do the job. If you've purchased Top Producer, ACT!, Access, Goldmine or some other contact management software that's great. If you aren't using it to its capacity, it might be time to dust off the owner's manual and see what more the program can do for you. But if you're just starting out and want to get your sphere's names, addresses and phone numbers gathered together in one convenient place, than you can likely do what you need with Outlook, Word/Works/WordPerfect, or even Excel.

Before you set out to purchase a new program, or sit down with those already on your system, you should give some thought to what you want to do with the software. If you only want a list of clients' names and addresses and perhaps a place to type in notes, your database can be real simple. If you want a program that will allow you to schedule reminders to yourself to call Dick next week about his investment property or to send Sally a follow up mail piece, than you'll need something more advanced. Talk with your colleagues to see what programs they use, how much they cost, and what they think of their own contact management system.

Once you've chosen a software application and have a basic working knowledge of it, it's time to input your data. Gather up all those loose sheets of paper, old database printouts, and sticky notes with contact information scribbled on them and consider one more matter...

There's an old phrase in the computer world most of us have heard before: "Garbage In, Garbage Out." In the context of your database, simply put, this means that your data is only be as good as the information you put into it. Consider: (1) Do you type quickly and with accuracy; (2) Have you talked with your sphere recently and know that the contact information you have is still current; and (3) How much information do you think is important to record in your database—home numbers, work numbers, children's names, pet's names, transaction anniversaries, etc. The answer to these questions should guide you as you set up your database.

Once you have all of your contacts entered into one program, you should be able to mail merge your database to create custom envelopes, mailing labels, and form letters. While the particular steps involved will depend on the programs you've chosen to use, this will make the task of keeping in touch with—and in front of—your sphere easier and more manageable.

If all of this seems too overwhelming, ask for help, but keep trying! Before long you will get the hang of it. In the meantime, *hang it there!*



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